

**National Framework Agreement for the Provision of Asset and Contract Lifecycle  
Management Services**

**Project Reference: F/015/CORP/17/MH**

**SCHEDULE A**

**FRAMEWORK AGREEMENT SPECIFICATION**

## SUPPLY SPECIFICATION

### A.1 Output Supply Requirement

This procurement exercise will lead to a single supplier Framework Agreement. The Framework will be for the provision of an end to end outsourced asset and contract lifecycle management solution spanning procurement, contract management and service delivery management for a range of contracts, including medical maintenance, estates maintenance and services and any other contract identified by a Client Organisation.

The Framework will be awarded as a single lot, with Bidders being required to meet all aspects of this Technical Specification. Client Organisations will, however, be able to contract for elements of the service as required.

### A.2 The Requirement

Client Organisations often have limited procurement and contract management resources and require an outsourced solution that will enable them to extract maximum value from a range of (mainly) maintenance and service contracts throughout their lifecycle.

Specifically, the Supplier must have experience of delivering this service to NHS Client Organisations, including medical maintenance, hospital estates maintenance and services contracts. The Supplier is expected to be able to manage similar contract types in other Public Sector bodies.

### A.3 Summary of Requirements

The Requirements will include but not be limited to:-

1. Management of the portfolio: Take over management of the Client Organisation's maintenance and service contracts portfolio
2. New Contracts and Renewals: Manage the procurement of all contracts within the portfolio
3. Management of the Service Delivery of Contracts: Manage the service delivery of the contracts by suppliers
4. Reporting: Accurately report on any saving efficiencies forecast or made through the letting or management of such contracts to a client trusts specification.
5. Stakeholder Engagement: Carry out active stakeholder engagement throughout the contract.
6. Additional requirements: Deliver additional services bespoke to individual client requirements.

### A.4 Detailed Requirements

#### A4.1 Management of the portfolio

The Supplier will be required to take over management of an agreed portfolio of maintenance and service contracts. The Supplier will be required to but not be limited to:-

Collect details of all contracts to be included within the portfolio from a range of sources including central databases and budget holders. These details must include the scope of the contract (primarily device, equipment, asset or area), the current supplier and the contract end date.

Verify that this data is correct with all suppliers.

Create a comprehensive online contract database, available to the Client Organisation at all times, which includes all of the above information.

Identify opportunities for consolidation and rationalisation of contracts and outline optimal procurement strategies to the Client Organisation.

Create a report or plan outlining the route to market for each procurement, to be agreed with the Client Organisation. This must adhere to all relevant Public Procurement rules and regulations and to the Client Organisation's internal regulations detailing contract renewal (for example NHS Trust Standing Financial Instructions).

Following research, to identify additional contracts that should be added to the scope.

### **A.4.1.1 Contract Management**

The Supplier must actively manage contracts on behalf of the Client Organisation. This must include reviewing multi-year agreements annually and ensuring that any amendments to device or asset lists are made on the online contract database and manage any deviation in payments required as a result.

### **A.4.1.2 Online Contract Database**

The Supplier must provide continuous access by the Client Organisation to the online contract database which provides, as a minimum, the following information:-

Full details of all contracts in scope, including all related documentation, costs, term, service levels, and details of the procurement route followed prior to putting in place a contract such as quotes and bids received following a tender.

Full itemisation of all contracts, listing all assets or devices under contract, and show the service costs per asset/device and the service schedules required.

An online log of all maintenance or service visits conducted by the suppliers, including all relevant service documentation, that provides the Client Organisation with the ability to immediately demonstrate compliance with Care Quality Commission (CQC), NHS Resolution (formerly NHSLA) and any successor bodies to these organisations and with other regulatory frameworks designed to ensure that maintenance and service schedules are both appropriate and carried out as required.

Details of all procurements (current, future and historical) including updates on latest status and an indication of the likely date on which the procurement will complete.

The ability to link multiple contracts to assets or devices to facilitate effective asset management strategies.

### **A.4.2 New contracts and renewals**

The Supplier must agree the procurement process with the Client Organisation for different types of contracts, including contracts of different value and type. This process must include who at the Client Organisation is responsible for approving the procurement of each contract and where approval from the Client Organisation must be sought.

The Supplier must manage the entire procurement process for all contracts in scope, ensuring best value and delivering savings for the Client Organisation wherever possible. This includes renewal of contracts which the Client Organisation already has in place AND the procurement of new maintenance and service contracts.

The Supplier must maintain a copy of all documents linked to the contract renewal, and these documents must be linked to the relevant contract on the online contract database so that a clear audit trail is maintained of the contract details and renewal history. The online contract database, including these documents, must be available to the Client Organisation at all times.

The Supplier must maintain a record of all suppliers and correspondence with them throughout the contract renewal and these records must be linked to the relevant contract on the online contract database so that a clear audit trail is maintained of the contract details and renewal history.

The Supplier must have internal procedures in place to ensure that contracts are renewed according to the current contract expiry date.

The Supplier must renew the contract in accordance with the agreed process unless it is agreed otherwise with the Client Organisation.

The Supplier must negotiate with suppliers, if the procurement process allows, to achieve best value and savings wherever possible.

All procurements must be fully compliant with both EU procurement law and the Client Organisation internal regulations/Standing Financial Instructions and as amended.

The Supplier must maintain a complete audit trail of all contract renewals linked to the relevant contract on the online contract database. This must include all routes to market reports, quotes, proposals, correspondence and tender documents.

The Supplier must be able to advise the Client Organisation on legal issues arising from planned or prospective procurements.

The Supplier must agree a set of standard terms and conditions to use in all procurements, except in special circumstances to be agreed in advance with the Client Organisation.

The Supplier must ensure that contract conditions are favourable to the Client Organisation, which could in some circumstances require standard Terms and Conditions to be amended.

Following the procurement process, full documentation of every recommendation, (including the process followed, quotations, and details of any negotiations or full details of the results of any tenders) is to be sent to all stakeholders within the Client Organisation for their approval, enabling full audibility of all decisions. Agreement of stakeholders must be obtained before the contract is put in place. A clear audit trail of any rejections or queries in relation to the proposals must be maintained.

When the contract has been agreed by the Client Organisation and the supplier, the Supplier must obtain a copy of the purchase order, check that it is in line with the recommendation and log it on the online contract database.

### **A.4.2.1 Tenders**

Where a tender is required either by EU Public Procurement law or the Client Organisation internal regulations, or where it is considered that a tender would provide best value even though not required by law or regulations, in addition to all of the above, the Supplier will be required to undertake the following procedures:-

Where the Client Organisation internal regulations suggest that a tender may be required due to the potential lifecycle value of the contract, the Supplier will develop a full route to market proposal outlining the compliant procurement process that will be followed and obtain agreement from the relevant stakeholders at the Client Organisation.

The Supplier will manage every aspect of the tender (in consultation with the Client Organisation stakeholders) including advertising with the Official Journal of the European Union (OJEU) and Contracts Finder contract notices, if required, development and preparation of technical specifications, scoring methodologies, questions, award criteria and criteria weightings.

The Supplier will advise on the content and structure and draft invitation to tender documentation, including the provision of advice on legal aspects, if required.

The Supplier will provide all documentation required during the invitation to tender process.

The Supplier will prepare all documents, including Pre-Qualification Questionnaires and Invitations To Tender.

The Supplier will agree all tender documentation with the Client Organisation prior to the start of the tender process.

The Supplier will provide the Client Organisation with assistance in evaluating and scoring the tenders received.

The Supplier will review the Client Organisation's scoring of tenders and confirm the winning bidder.

The Supplier will provide feedback to unsuccessful tenderers, complying fully with EU Public Procurement law where the contract is subject to this legislation.

The Supplier will publish Contract Award Notices in OJEU and Contracts Finder if required.

The Supplier will maintain a clear audit trail of all documentation and communication with bidders which is linked to the relevant contract on the online contract database.

The Supplier will run a fully compliant procurement process with EU procurement law where applicable.

### **A.4.3 Managing the Service Delivery of Contracts**

Following every procurement process, whether for a renewal of an existing contract or the procurement of a new contract, the Supplier must manage the service delivery of contracts. This must include but not be limited to:-

Ensuring that details of the service visits required under each contract are maintained, and that these are linked to the relevant contracts on the online contract database.

Ensuring that suppliers agree the details of the service visits required under each contract.

Providing the ability for suppliers to upload service documentation to an online system against the agreed schedule.

Ensuring that suppliers adhere to this requirement and deliver the services as outlined in the relevant Technical Specification.

Ensuring that the online system is continuously available to the Client Organisation so that they will have instant visibility of all service calls made for each device and the ability to report on which planned visits have been missed.

Following up with suppliers to ensure that records for required visits are uploaded and report any non-compliance to the Client Organisation.

Driving client activity and decision-making via the use of online systems.

### **A.4.4 Reporting**

The Supplier must be able to provide a range of standard reporting including but not limited to:-

Savings achieved across the portfolio

Numbers of contracts renewed

Outstanding tasks with the Client Organisation

Outstanding tasks with the Supplier

Status of each contract

The Supplier will also be required to consider requests from the Client Organisation for bespoke reports.

#### **A.4.5 Stakeholder Engagement**

The Supplier must carry out active stakeholder engagement across the client organisation which includes but is not limited to the following:-

Ensure requirements are obtained and any changes are reflected in the new contract to be procured.

Renew all contracts in good time to minimise lapsed contracts.

Communication must be maintained throughout the procurement and contract management process.

Produce a route to market and obtain formal approval from agreed stakeholders prior to any mini competition or tender being issued.

Assist stakeholder in preparing formal specifications.

Provide stakeholders with details of alternative suppliers (non OEM) and indicative costs.

Challenge the status quo – ensuring stakeholders comply with the organisations SFI's and run competitive processes to generate savings.

Carry out process and tasks in an appropriate manor to minimise waivers.

Carry out periodic reviews with senior managers as agreed.

The Supplier will challenge and escalate decisions in line with agreed procedures, where opportunities to reduce costs are ignored.

The Supplier is responsible for engagement with suppliers throughout any tender process, including site visits.

#### **A.4.6 Additional Requirements**

Client organisations may wish to procure additional innovative solutions which may complement the primary offering. As these specific requirements may vary significantly between client organisations, these services will not be assessed in this framework ITT. However all additional services not described in A4.1 Management of the Portfolio may be purchased under the terms of this framework provided they conform to the principles within this specification.

The value of additional services must not exceed 20% of the total call off contract value. Ad-hoc additional service prices will be negotiated by the awarding authority at the point of contract award.